Driving Transformation through Project Management, Change Management and Training

Customer Profile

Coast Mental Health is a non-profit and registered charity based in Vancouver, British Columbia, serving people living with mental illness since 1972.Their mission centers on supporting, advocating for, and promoting recovery through a comprehensive, person-centered approach that emphasizes hope, compassion, courage, respect, and collaboration. They operate 52 facilities and manage over 1,400 homes, making them one of Canada's largest non-profit housing providers for people with mental illness.

Goals

- Improved Data Consistency
- Enhanced Operational Efficiency
- Scalable Growth
- Empowered & Trained Staff

Industry

Nonprofit

Country or Region

Across Canada

Partner

Endeavour Solutions Inc.
www.endeavoursolutions.com
www.purelycrm.com

Executive Summary

Coast Mental Health is a non-profit organization dedicated to expanding supportive housing, programs, employment, education services, and fundraising initiatives. As the organization grew, it became evident that existing software systems could not support real-time, strategic, data-driven decision-making. To address these challenges, they sought a unified platform to eliminate cross-departmental data silos and enable integration across business applications, including installations, data migration, customization, and integration.

Business Challenge

Coast Mental Health worked with Endeavour Solutions to modernize and migrate its CRM from On-Premise to a new Microsoft Cloud CRM powered by Dynamics 365 and the Power Platform. The technical and functional migration went flawlessly, but when it came time to release the updated application to Coast Mental Health staff, the internal project team felt the need for additional outside assistance.

Solution Approach

Endeavour Solutions extended the CRM Cloud Migration project to include additional advisory services, including strategic change management and targeted training to address these issues. The results: high user adoption, improved enterprise collaboration, and enhanced service delivery to clients.

Change Management Strategy
Endeavour recognized that technology adoption hinges on user buy-in. Their change management process focused on:

- **Tailored Communication:** Regular updates, town halls, and feedback sessions kept staff informed and engaged.
- **Leadership Champions:** Internal advocates supported peer-to-peer training and helped drive a positive attitude toward change.
- **Impact Analysis:** Business impact and readiness assessments of pinpointed areas requiring extra support and resources

Training for User Adoption

Endeavour Solutions delivered a comprehensive training program designed for Coast Mental Health's unique needs:

- **232 Hours of Training:** Spanning hands-on workshops, video guides, and support desks.
- **Role-Based Curricula**: Staff trained specifically for their workflows, maximizing relevance and retention.
- **Change-Ready Onboarding:** Training materials were directly integrated with Coast's existing change management processes, blending seamlessly with organizational culture.
- **Just-in-Time Learning:** Immediate support and troubleshooting for staff during the go-live window.

Business Impact

The Endeavour-led transformation yielded substantial organizational benefits:

- **Rapid User Adoption:** Over 700 staff quickly embraced the new system, empowered by context-sensitive training and internal champions.
- **Operational Efficiency:** Automation and real-time data access replaced manual processes, boosting productivity and reducing errors.
- **Enhanced Collaboration:** Unified data and integrated applications fostered seamless cross-departmental communication.
- **Informed Decision-Making:** Robust Power BI dashboards provided executives with actionable insights into program effectiveness and client outcomes.
- **Security and Compliance:** Granular access controls and real-time monitoring strengthened data protection and accountability.
- **Scalability for Future Growth:** The flexible Microsoft-based application architecture supports continued expansion as Coast Mental Health grows its portfolio of service.
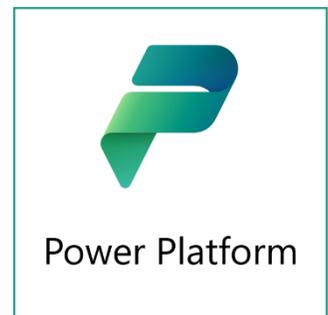
Project Management Excellence

Endeavour Solutions' methodical project management, change management, and robust training regimen were critical to the successful transformation at Coast Mental Health. The partnership enabled rapid adoption of a scalable CRM solution, driving measurable improvements in efficiency, data-driven decision-making, and operational excellence—supporting Coast Mental Health's mission to serve an even broader community.

About Endeavour Solutions

Endeavour Solutions is a Microsoft AI Cloud Partner and leading CRM consultancy specializing in Microsoft Dynamics 365 across North America. With offices in both Canada and the United States, Endeavour offers a full suite of services—including consulting, implementation, upgrades, custom development, data analytics, training, and ongoing support for Dynamics 365 CRM and related Microsoft platforms.

Our firm is recognized for its award-winning expertise and commitment to helping mid-sized organizations improve their sales, customer service, and marketing performance. Endeavour's proven track record, industry recognition, and deep Microsoft knowledge make it a trusted partner for driving CRM success.

ENDEAVOUR

Canada | United States | International